

SAP Training



TM310 Leave Administration



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Welcome to the BEACON SAP *TM310 – Leave Administration* training.

Notes

Prerequisites

Prior to attending this course you should have taken the following prerequisites:

- BEACON Overview - BC100
- SAP Basic Navigation - BC110
- Time Overview – TM200
- Introduction to Leave Administration - TM210



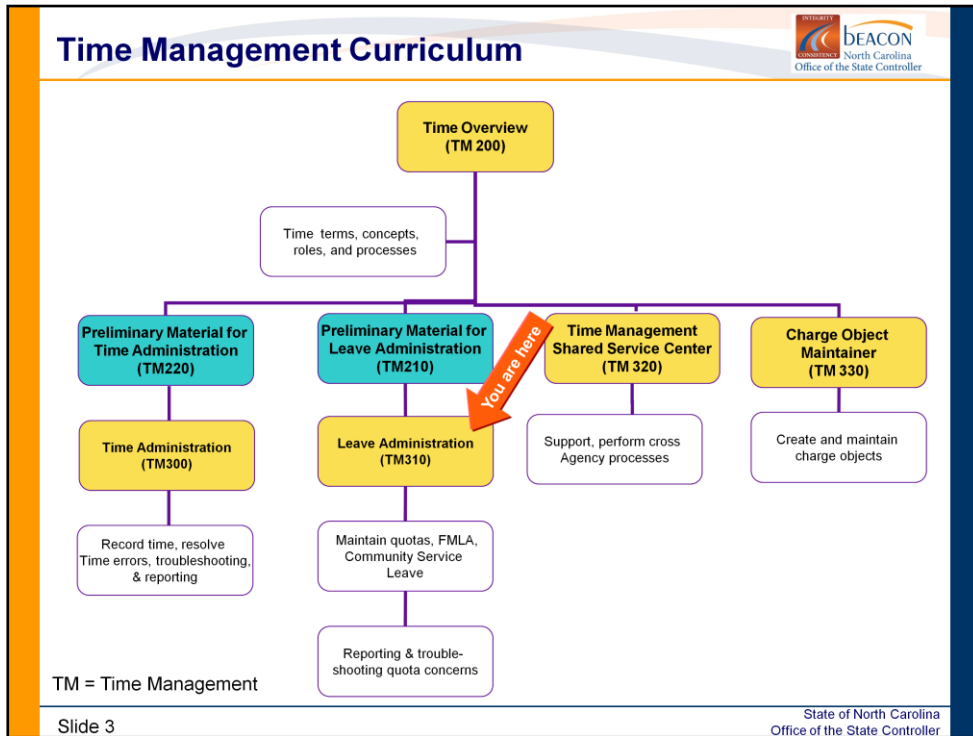
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Notes

There are four pre-requisites that you must take before attending this class. Attending these pre-requisites ensures that you are prepared to learn the new processes, concepts, terms, and data entry skills that are covered in this course.



As noted in the pre-requisites this class is preceded by the web based course *TM210 – Introduction to Leave Administration*.

Notes

SAP - Welcome

Welcome to the *Leave Administration* course.

- Introductions
- Sign the Training Attendance Sheet
- Classroom etiquette
- Cell phones off
- No side conversations



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Notes

The course introduction is an opportunity to get to know the others who are attending this class as well as agree on classroom courtesy. The instructor will inform you about the facilities and when the breaks will occur.

Please make sure you receive the credit you deserve for attending this class by signing the attendance sheet.

Welcome: Strategy for Training



• Tell me	Concepts Instructor will discuss the process, responsibilities, and describe the transactions – LISTEN
• Show me	Demonstrations Instructor will demonstrate job-related tasks performed in SAP – HANDS OFF
• Let me	Exercises Student will complete the exercises which allows for hands-on practice in class – HANDS ON
• Support me	Availability Instructor will be available to answer questions while the students complete the exercises

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Notes

The *Leave Administration* student guide provides a copy of the PowerPoint slides used during the classroom training. You will observe that space is provided for you to write notes. You can use the guide as a reference when you return to the workplace. For example you can use the exercises for practicing in the SAP Training Environment.

Reference Materials

- Student Guide
- Exercise Guide
- Job Aids
- Other resources:
 - Online Help
 - Simulations
 - Work Instructions



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Notes

Simulations let you practice using SAP in a clearly defined and safe environment. Each simulation has instructions to guide you through the task. Simulations are available only for select transactions.

BEACON Online help

- Provides step-by-step procedures by screen
- Includes links to complete step-by-step procedures that you can print
- Includes links to simulations

To access BEACON Help from any SAP screen, select the **Help > BEACON Help** menu option

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Notes

To access BEACON on line help:

- <http://help.mybeacon.nc.gov/beaconhelp/>

Course Map

Lesson 1: Overview

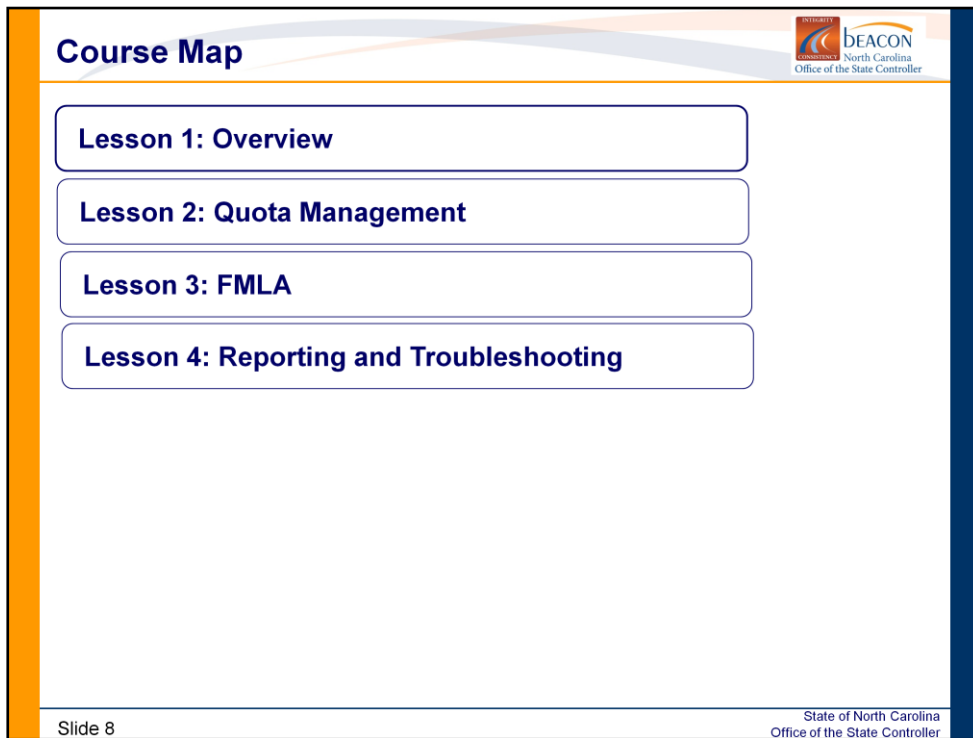
Lesson 2: Quota Management

Lesson 3: FMLA

Lesson 4: Reporting and Troubleshooting

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Notes

This course is designed to provide you with knowledge and skills necessary to perform Leave Administration in SAP.

Course Objectives

Upon completion of this course, you should be able to:

- Explain how information in other BEACON modules may affect time, payroll, and quotas.
- Describe the Quotas available to employees.
- Describe and execute the process for quota corrections.
- Describe and execute the maintenance of FMLA-relevant absences.
- Perform basic quota reporting and troubleshooting.

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Notes

Course Map

Lesson 1: Overview

Lesson 2: Quota Management

Lesson 3: FMLA

Lesson 4: Reporting and Troubleshooting

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Lesson Objectives - Overview

Upon completion of this lesson, you should be able to:

- Explain how information in other BEACON modules may affect time, payroll, and quotas
- List leave quotas in BEACON
- List key changes:
 - Leave Hierarchy
 - Leave Offsetting
 - Holiday Behavior
 - Time Evaluation

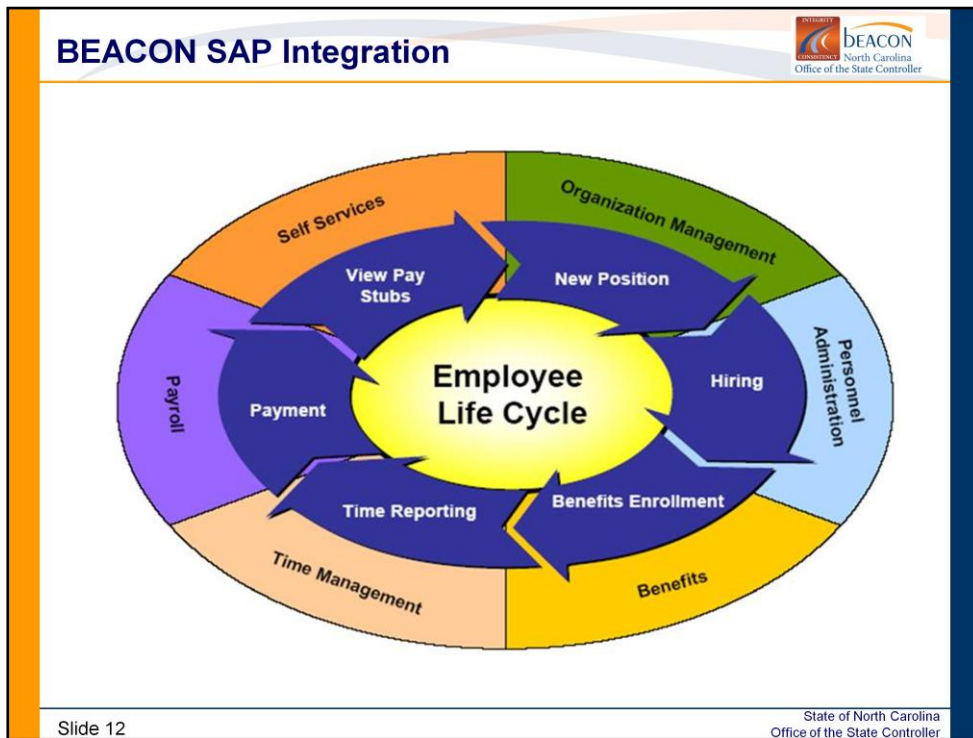


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Notes




Notes

Because BEACON is an integrated system, entries made in one module affect other system components, such as an employee's time and pay.

Some infotypes entered are tied directly to the employee, like work weeks, schedules, addresses, and tax withholding information. Other infotypes are applied to the position and affect things like how BEACON looks at holidays, overtime, and premium pay. OM, PA, BN, and TM settings all can affect an employee's paycheck.

PA Infotypes and Time, Benefits, Payroll

- IT0000 – Actions
- IT0001 – Organizational Assignment
- IT0002 – Personal Data
- IT0006 – Address (permanent)
- IT0007 – Planned Working time
- IT0008 – Basic Pay
- IT0041 – Date Specifications
- IT0552 – Time Specification/Employ. Period
- IT2003 – Substitution
- IT2001 – Absences



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Notes

To understand some of the interconnection between BEACON modules, we need to look at how some of the infotypes from one area may affect processing in another. For example, the infotypes listed above are entered in PA, but affect an employee's time, benefits and payroll.

The next few slides give some details on some of these interconnections.

PA Infotypes and Time, Benefits, Payroll

Display Actions (0000)

Pers.No. 00000327
 Name Kumar, Reinaldo02
 EEGroup A SPA Employees PersA 4601 Cultural Resources
 EESubgroup A1 FT N-FLSAOT Perm
 Start 05/05/2008 to 12/31/9999 Chng 08/18/2008 ZWF1N0MPA191

Personnel action
 Action Type Leave of Absence (NC)
 Reason for Action 10 Reserve Active Duty (Leave)

Status
 Customer-specific
 Employment Active
 Special payment Standard wage type

Display Organizational Assignment (0001)

Personnel No. 00000327 Name Kumar, Reinaldo02
 EEGroup A SPA Employees PersA 4601 Cultural Resources
 EESubgroup A1 FT N-FLSAOT Perm Statu Active
 Start 05/05/2008 to 12/31/9999 Chng 08/18/2008 ZWF1N0MPA191

Enterprise structure
 CoCode NC01 STATE OF NC
 Pers.area 4601 Cultural Resources Subarea NC01 7day Norm
 Cost Ctr 4699999999 CULTURE RESOUR Bus. Area 4600 Cultural Resources
 Fund 4699999999 CULTURE- SUSPEI
 Func. Area 6000000000000001

Personnel structure
 EE group A SPA Employees Payr.area 01 NC Monthly
 EE subgroup A1 FT N-FLSAOT Perm Contract

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Notes

Time, Payroll and Benefits use information from IT0000 and IT0001.

- **Actions IT (0000):** Employment status (Active, Inactive, Withdrawn).
- **Org Assignment IT (0001):** Employee Group, Employee Subgroup, Personnel Area, Personnel Subarea, and Payroll area.

PA Infotypes and Time, Benefits, Payroll

Infotype Edit Goto Extras System Help

Display Addresses (0006)

Personnel No 08000736 Name Allison Sellers02
 EEOGroup A SPA Employees PersA 4601 Cultural Resources
 EESubgroup 01 FT S-FLSAOT Perm Statu Active
 Start 01/01/2008 to 12/31/9999 Changed on 06/09/2008 ECATT

Address type Permanent residence
 Address line 1 2151 Meadow Lane
 Address line 2
 City/county San Jose
 State/zip code NC North Carolina 27609
 Country Key USA
 Telephone Number 919 707-1422

Communications
 Type Number 0
 Type Number 0
 Type Number 0
 Type Number 0

Display Personal Data (0002)

Personnel No 08000736 Name Allison Sellers02
 EEOGroup A SPA Employees PersA 4601 Cultural Resources
 EESubgroup 01 FT S-FLSAOT Perm Statu Active
 Start 08/11/1960 To 12/31/9999 Changed on 06/09/2008 ECATT

Name
 Title
 Last name Sellers02 Birth name
 First name Allison
 Middle name
 Designation
 Suffix
 Name Allison Sellers02

HR data
 BSN 572-05-9849
 Date of Birth 08/11/1960
 Language English
 Marital Status Single
 Gender Female Male
 Dependents 0

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Notes

Personal Data IT0002

Social Security number, date of birth and marital status

Addresses IT0006

Tax infotypes (Residence Tax, Work Tax Area, Unemployment State) are associated with IT0006 – permanent address. If IT0006 is skipped during the New Hire Action, the tax infotypes do not display, and the employee's record will error out in payroll.

If the address information is incorrect:

- a separated employee does not receive his or her final paycheck.
- An employee may not receive W2s at the end of the year.

PA Infotypes and Time, Benefits, Payroll

Work Schedule Rule Example (D01N08GN)

- D = Days
- 01 = Schedule number
- N = No weekends
- 08 = Hours per day
- GN = General Schedule (common schedule)

Work schedule rule

Work schedule rule	D01N08GN	MTWTF-8,SaS-O
Time Mgmt status	1 - Positive Time Recording	
Working week	Wk - Sun (mdn) - Sat	
<input type="checkbox"/> Part-time employee		

Working time

Employment percent	100.00
Daily working hours	8.00
Weekly working hours	40.00
Monthly working hrs	173.33
Annual working hours	2080.00

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Notes

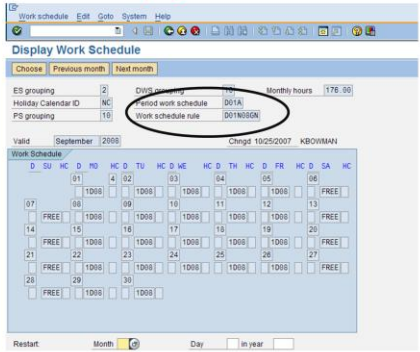
Planned Working Time: The Work Schedule Rule (WSR) is the foundation on which an employee's time is processed in BEACON SAP. Each employee is assigned a WSR that best represents his or her work pattern. The WSR combines an assigned holiday calendar (the main State holiday calendar or an alternate calendar approved by OSP) with a repeatable pattern of work representing an employee's scheduled work days and scheduled non-work days. The WSR can represent work patterns repeated over single or multiple weeks and may include day, evening, and night shift designations that trigger premium payments at rates designated for the employee's position (as set for the position in OM).

The WSR does not limit the number of hours an employee may record on any given day, but only allows leave to be taken on scheduled work days. Many fields trigger other time functions. For example, Time Sheet Defaults, IT0315 (from PA20) are directly related to the Time Management Status field on IT0007. A Time Mgmt Status of 1 indicates that a time sheet is required, and 9 indicates a Time Sheet is not required (positive time or negative time). If a negative time employee is on Leave of Absence, IT0007 must be revised to change the employee to positive during the Leave and changed back to negative on Reinstatement.

Negative time employees should be employees who work 5 days a week, 8 hours a day.

Planned Working Time – Effect on Pay

•Employee A – IT0007

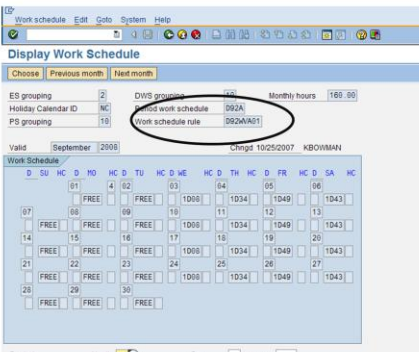


•Pay formula:

- # of days worked in schedule
- Divided by # of possible work days in schedule
- Times the monthly pay amount

- Employees start work on same day
- Employees get same monthly rate
- Employees receive different pay because of work schedules assigned

•Employee B – IT0007



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Notes

Example of IT007 Impacts Employee's Pay


This example describes two employees hired on the same day but given two different work schedules. Both employees are paid \$6,250 monthly salary.

Employee **A** starts on Sept 19 and is assigned work schedule D01N08GN which has 22 possible work days in the month. Counting Sept. 19th, the employee worked 8 days of the possible 22. The Pay is figured by this formula: 8 days divided by 22 times the monthly rate (\$6,250) = \$2,272.73 paid for the month for Employee A (based on IT0007 and IT0008).

Employee **B**'s work schedule (D92WVA01) has 16 possible work days in the month. Counting the first day Employee B reported to work (9/19), the employee worked 6 out of the 16 days. The number of days worked (6) divided by the possible work days (16) times the monthly salary (\$6,250) calculates a pay of \$2,343.75.

You can see that both employees were paid correctly, yet the specific work schedule, and Basic Pay (IT0008), determined two different pay amounts. This shows how schedules entered in PA can affect employee pay. Note that, unless the employee has a significant number of days without pay (A/A Type 9400), this discrepancy would only affect the first and last months that an employee is on a certain schedule.

PA Infotypes and Time, Benefits, Payroll



Display Basic Pay (0008)

Personnel No Name

EEGroup SPA Employees PersA Cultural Resources

EESubgroup FT N-FLSAOT Perm Statu

Start to Chng ECATT

Subtype Basic contract

•Reason field must be entered
 •Other fields default from position

Salary		Reason		New Hire		Capacity Util. Level	
Reason	<input type="text" value="Z0"/>	New Hire		Capacity Util. Level	<input type="text" value="100.00"/>		
PS type	<input type="text" value="01"/>	Graded		Work hours/period	<input type="text" value="173.33"/>	Monthly	
PS Area	<input type="text" value="01"/>	Annual Salaries		Next increase			
PS group	<input type="text" value="GR68"/>	Level	<input type="text" value="6R"/>	Annual salary	<input type="text" value="35,500.00"/>	USD	

Wa	Wage Type	Long Text	O	Amount	Curr	I	A	Number/Unit	Unit
1000	Regular Salary			2,958.33	USD		<input checked="" type="checkbox"/>	0.00	

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Notes

Basic Pay: Salary or hourly wages

The **Salary Amount** button does not calculate correctly for DOT employees, but does calculate for all non-DOT wage types. You must manually enter information in the Reason field during the Action. The remaining IT0008 fields default from the PCR for a salaried employee. In the case of an hourly employee, you must enter the hourly wage in the Amount field.

You would seldom make an entry directly on IT0008. Most of the adjustments involving an employee's pay would result from an Action. However, one example of when it is appropriate to make a direct adjustment to IT0008 is when an employee returns to work part-time while receiving partial Worker's Comp.

PA Infotypes and Time, Benefits, Payroll

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Infotype Edit Goto Extras System Help

Display Date Specifications (0041)

Personnel No. 00000336 Name Kumar, Reinaldo11
 EEO Group A SPA Employees PersA 4601 Cultural Resources
 EEO Subgroup A1 FT N-FLSAOT Perm Statu Active
 Start 09/02/2008 to 12/31/9999 Chng 08/28/2008 ZWF INORPA191

Date type	Date	Date type	Date
01 Original Hire Date	01/01/2008	02 Agency Hire Date	09/02/2008

Infotype Edit Goto Extras System Help

Display Time Specification/Employ. Period (0552)

Personnel No. 00000336 Name Kumar, Reinaldo11
 EEO Group A SPA Employees PersA 4601 Cultural Resources
 EEO Subgroup A1 FT N-FLSAOT Perm Statu Active
 Start 01/01/1997 To 12/31/2007 Chng 06/18/2008 ECATT

Time specifications/employment period
 Time spec. 0001 ALAMANCE-CASWELLAREA MHMRISA
☐ Do not evaluate

Creditable service period		Imputable period	
Years	0	Years	0
Months	132	Months	0
Days	0	Days	0

Comments

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Date Specifications IT0041

Time Evaluation bases leave accruals and longevity payments on dates contained on IT0041 so they must be an accurate reflection of the employee's State career. Supplemental Staff employees will not have an IT0041. Initially the Original Hire Date and Agency Hire date are the same. If an employee has a Reinstatement Action (either the employee was on Leave of Absence (LOA) and returned, or left State employment and returned), or Transfer Action, the Agency Hire date will automatically reflect the date of the Reinstatement or Transfer Action.

Time Specification/Employ. Period IT0552

Creditable service earned prior to BEACON must be entered on IT0552. Once an employee is entered into BEACON, the system automatically calculates service and longevity dates using the Time module. If HR makes changes to IT0552 that affect the longevity date, BEACON will take back any money already paid out and repay based on the new longevity date. If you make a change on IT0552, you must email BEST with the name of the employee. Do not adjust the original IT0552 entry from conversion. If an employee has creditable service from more than one organization, enter additional IT0552s to add the additional organizations, rather than extending the date on the original IT0552 to include the additional service dates.

Notes

Type	Text
01	Employee Substitution
02	Shift substitution
05	LOA Generic
06	STD (1st 6 mths prior 89)
07	STD (2nd 6 mths prior 89)
08	STD (1st 6 mths after 89)
09	STD (2nd 6 mths after 89)
10	LOA - FMLA
11	LOA - WC Regular
12	LOA - WC Salary Cont
13	LOA - Military

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Notes

The Substitutions infotype is used to indicate that the employee is working something other than his or her regular schedule or is on a Leave of Absence. Substitutions may be daily or for weeks at a time. IT0007 – Planed Working Time is overwritten with the properties of the Substituted schedule. Some examples include:

- An employee is working at a time other than his or her planned work schedule. For example: employee works on day off, or works on a shift that has a different premium (or has no premium) than his or her usual shift.
- A full-time employee is returning from a Worker's Comp LOA (Reinstated Action), but is only working 4 hours a day. PA30 is used to create IT2003 Substitution with a 4-hour schedule. In this case, IT0008 must also be adjusted.
- An employee is on Leave of Absence (LOA). IT2003 is entered as part of the LOA Action (see next page).

IT2003 Substitutions for LOA (cont.)



Infotype Edit Goto Extras System Help

Create Substitutions (2003)

Personal work schedule Activity allocation Cost assignment External services

Personnel No: 80000327 Name: Kumar, Reinaldo02

EE group: A SPA Employees Personnel ar: 4601 Cultural Resources

WS rule: 001N086N MTWHF-8,SaS-O Status: Active

From: 08/18/2008 To: 08/18/2008

Subst. type: 02 Shift substitution

Daily work schedule:

Work schedule rule: ES grouping:

Holiday Calendar ID: PS grouping:

Substitution Type (1) 11 Entries found

Restrictions

PS Grouping: 10

Type	Text
01	Employee Substitution
02	Shift substitution
05	LOA Generic
06	STD (1st 6 mths prior 89)
07	STD (2nd 6 mths prior 89)
08	STD (1st 6 mths after 89)
09	STD (2nd 6 mths after 89)
10	LOA - FMLA
11	LOA - WC Regular
12	LOA - WC Salary Cont
13	LOA - Military

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Notes

Leave of Absence (LOA) is covered in *PA410 Advanced Create and Maintain Employee Data*, but you should be aware of how the LOA Action affects an employee's time.

Every employee on LOA must be placed on a substitution work schedule. Like other time infotypes, IT2003 - Substitution displays as part of the LOA Action.

IT2001 - Absences

Infotype Edit Goto Extras System Help

Create Absences (2001)

Personal work schedule Activity allocation Cost assignment External services

Personnel No 00000756 Name Nancy Gonzalez02

EE group A SPA Employees Personnel ar 4601

WS rule D01N086N MTWTF-8,SaS-O

Start 12/03/2008 To 12/15/2008

Absence

Absence type 9000 Approved Leave

Time - ☐ Prev day ☒ Full-day

Absence hours 24.00

Absence days 3.00

Calendar days 5.00

Quota used 24.00 Hours

Advance payment

Off-cycle reason

Payment date

Payroll identifier

Payroll type

Subtypes for infotype "Absences" (1) 15 Entries found

Restrictions

PSG	A/Aty	Att./abs. type text
10	9000	Approved Leave
10	9200	Sick Leave
10	9300	Holiday Leave
10	9400	Leave without Pay
10	9540	Other Mgmt Approved Leave
10	9545	Adverse Weather
10	9547	Communicable Disease
10	9550	Civil Leave - Jury Duty
10	9560	Community Service Leave
10	9565	Community Svc-Tutoring
10	9570	Educational Leave
10	9620	Military Training Leave
10	9630	Military Active Duty
10	9680	Injury Absence W/C
10	9685	Injury Leave

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Notes

The Absences infotype (IT2001) indicates the number of hours the employee wants to exhaust for leave while on Leave of Absence or the number of hours the employee is taking unpaid leave. When the dates are entered, the hours that default are based on the work schedule rule entered on the Substitution infotype (IT2003) which was created as part of the LOA Action.

Because BEACON is integrated, the hours entered on the Create Absences infotype are fed directly to payroll. A time sheet does not have to be entered.

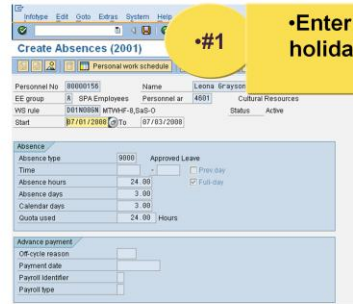
As long as the employee is receiving pay (leave or work), benefits continue to be deducted. If not receiving pay, the employee must pay for benefits or discontinue them.

IT2001 – Absences with Holiday



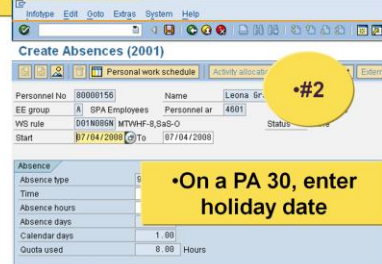
#1

•Enter leave dates up to the holiday on the original LOA Action



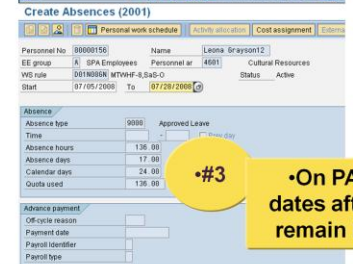
#2

•On a PA 30, enter holiday date



#3

•On PA 30, enter leave dates after the holiday for remain leave being used



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Notes

If the employee is exhausting leave during a time that includes a holiday, additional IT2001 infotypes will be necessary to allow the employee to take holiday leave. For example, assume an employee is going out on military leave on July 1 and wants to exhaust 160 hours vacation prior to beginning the military 30 days. In this scenario, there is one holiday period (7/4). Your entries would be as follows:

1. During the LOA Action, on the Absences (IT2001) infotype subtype 9000, you will enter the dates for the leave to be exhausted **up to** the holiday period in the Start and To fields:
 Start: 7/1/2008 To: 7/3/2008 (24 hours **leave**)
2. Create a PA30 to enter the first holiday period, infotype 2001, subtype 9300:
 Start: 7/4/2008 To: 7/4/2008 (8 hours **holiday**)
3. Create a PA30 to enter the remaining leave, infotype 2001, subtype 9000:
 Start: 7/5/2008 To: 7/28/2008 (136 hours **leave**)

Position Infotypes - Employees and Time

Position flags set on specific infotypes also affect employee time and pay:

- Overtime Compensation – IT9005
- Holiday Payout Period – IT9006
- Night Shift Premium – IT9007
- Evening Shift Premium – IT9008
- Weekend Shift Premium – IT9009
- Holiday Premium Rate – IT9010
- On-Call – IT9011
- Callback – IT9012

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Notes

HR personnel with access to PO13 will update the above infotypes for a position. If the position infotypes for the types of pay are not flagged correctly, even if hours are entered, released, and approved, the employee will not receive the correct pay.


If you **revise** a **position** setting that is **retro** to a pay period before the current pay period, you **must contact BEST Payroll** to let them know to run time evaluation on the affected employees retro to that same time period. You only need to contact BEST Payroll if you revise a position. If you revise time for an employee, BEACON automatically runs time eval and adjusts the time records.

NOTE: If a position is revised, an email should be sent to BEST Shared Services. In the subject line, type “Retro Time Evaluation.”

In Organizational Management, the infotype codes do not display like they do in PA. To see the infotype number in PO13, select the infotype, and then click the “Activate infotype” button at the top of the screen. The infotype number will display in the message at the bottom of the screen.

Activate Infotype button: 

Overtime Compensation



Infotype Edit Goto View System Help

Create Overtime Compensation

Position	800904000836	Museum Specialist
Planning Status	Active	
Validity	08/20/2008 to 12/31/9999	Display change info

Overtime Compensation
01 S 65001751 1

OT Compensation Eligible ☒
Immediate Payout ☐

OR

Comp Aging Limit Days

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Notes

Overtime Compensation (IT9005)

If time worked beyond the overtime limit (40 hours, etc.) is to be paid or accumulated as compensatory time, the position must have a valid IT9005 record. If overtime compensatory time is to be paid out (FLSA Subject only) or expired (FLSA Not-subject only) at a point earlier than 12 months from when it was earned, the Comp Aging Limit field should be populated with the corresponding number of days (30 days, 60 days, etc.). If it is to be paid out immediately, the Immediate Payout checkbox should be checked. The default is 365 days. The setting on IT9005 works with IT2012 (discussed later) determine the rules for overtime compensation.

As indicated previously, an employee may have worked more than 40 hours and entered and released the time. Even if the time is approved by the manager, if the Overtime Compensation infotype is not flagged correctly for the position, the employee will not receive overtime compensation. An IT9005 record is not required if the position is not eligible for overtime pay or compensation.

Holiday Payout



Infotype Edit Goto View System Help

Create Holiday Payout Period

Position	800904000836	Museum Specialist
Planning Status	Active	
Validity	08/20/2008 to 12/31/9999	Display change info

Holiday Payout Period
01 S 65001751 1

Immediate Payout ☐ OR

Comp Aging Limit 365 Days

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Notes

Holiday Payout Period (IT9006)

If holiday compensatory time (equal time off for time worked on a holiday) is to be paid out at a point earlier than 12 months from when it was earned, the Comp Aging Limit field should be populated with the corresponding number of days (30 days, 60 days, etc.). If it is to be paid out immediately, the Immediate Payout checkbox should be checked.

The default is 365 days. If no record exists, the default value of 365 applies.

Shift Premiums

Create Night Shift Premium

Position: 800904000836 Museum Specialist
 Planning Status: Active
 Validity: 08/18/2008 to 12/31/9999
 Display change info

Night Shift Premium 01 S 65001751 1
 Night Shift Prem Elig: ☒
 Night Shift Prem Rate: 10 %

Create Evening Shift Premium

Position: 800904000836 Museum Specialist
 Planning Status: Active
 Validity: 08/18/2008 to 12/31/9999
 Display change info

Evening Shift Premium 01 S 65001751 1
 Evening Shift Prem Elig: ☒
 Evening Shift Prem Rate: 10 %

Create Weekend Shift Premium

Position: 800904000836 Museum Specialist
 Planning Status: Active
 Validity: 08/18/2008 to 12/31/9999
 Display change info

Weekend Shift Premium 01 S 65001751 1
 Weekend Shift Prem Elig: ☒
 Weekend Shift Prem Rate: 10 %

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Notes

Positions eligible for any of the premiums listed below must have valid infotypes.

Night Shift Premium (IT9007)

OSP approved rates other than the default of 10% must be entered in the Rate field.

Evening Shift Premium (IT9008)


OSP approved rates other than the default of 10% must be entered in the Rate field.

Weekend Shift Premium (IT9009)

OSP approved rates other than the default of 10% must be entered in the Rate field.

The various types of premium pay display as separate line items on the employee's pay stub only if the rates are different. For example, if an employee's evening and night shift are both 10%, the hours worked in the evening and night are together on one *Shift Premium* line item on the pay stub. On the other hand, if the evening rate is 10% and the night is 15%, two separate line items will show with the hours entered for the evening separate from the hours entered for night.

Holiday Premium Rate



Infotype Edit Goto View System Help

✓ ✗ 🔍 📄 🔄 👤 🔒 🔗 🔧 🔑 🔐 🔓 🔔 🔕 🔖 🔗 🔑 🔐 🔓

📄 🔍 🔑 🔐 🔓 🔔 🔕 🔖 🔗 🔑 🔐 🔓

Create Holiday Premium Rate

Position 800904000836 Museum Specialist

Planning Status Active

Validity 08/20/2008 to 12/31/9999 Display change infor

Holiday Premium Rate 01 S 65001751 1

Holiday Premium Rate 50 %

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Notes

Holiday Premium Rate (IT9010)

IT9010 is only required if the Holiday Premium Rate is different than 50%.

OSP approved rates other than the default of 50% must be entered in the Rate field.

On-Call



Infotype Edit Goto View System Help

Create On-Call

Position
800904000836 Museum Specialist

Planning Status
Active

Validity

08/18/2008
to
12/31/9999

Display change infor

On-Call
01 S 65001751 1

On-Call Eligibility
☒
On-Call Comp Accrued
☐

On-Call Rate
\$ 8.94

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Notes

On-Call (IT9011)


Positions eligible for On-Call compensation must have a valid IT9011 record.

The accrued box should be checked if the time is to be collected as On-Call comp time. The Rate field must be populated with the OSP approved on-call rate.

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Positions eligible for

IT2012 – Time Transfer Specifications



Infotype Edit Goto Extras System Help

Employee Time Transfer Type (1) 31 Entries found

Create Time Transfer Specifications (2012)

Personal work schedule Activity allocation

Personnel No 80000327 Name Kumar Retina
 EE group A SPA Employees Personnel ar 4601
 WS rule D01N086N MTWHF-8,SaS-O
 Start 08/18/2008 To 08/18/2008

Language key
 PS Grouping 01

Time transfer specification

Time transfer type 2004 Retirement Service (Yrs)
 Number of hours Hours

Trly	Start Date	End Date	Time transfer type text
2004	01/01/1990	12/31/9999	Set Actual Pay Behavior
2005	01/01/1990	12/31/9999	PERT Eligibility & Rate
2006	01/01/1990	12/31/9999	Holiday Ineligibility
2007	01/01/1990	12/31/9999	Baylor Plan - Reg (Beg)
2008	01/01/1990	12/31/9999	Incentive Pay - RN (Beg)
2009	01/01/1990	12/31/9999	Pay Immediate After 10
2010	01/01/1990	12/31/9999	Stop Longevity Payout
2019	01/01/1990	12/31/9999	Incentive Pay - LPN (Beg)
2020	01/01/1990	12/31/9999	Immediate Payout (OT)
2021	01/01/1990	12/31/9999	Process Adverse weather
2025	01/01/1990	12/31/9999	Commerec Monthly Long
2030	01/01/1990	12/31/9999	EPA Lump Sum Vac Acc
2031	01/01/1990	12/31/9999	Accrual - 26 days/yr
2032	01/01/1990	12/31/9999	Accrual - 24 days/yr
2033	01/01/1990	12/31/9999	% Longevity paid
2034	01/01/1990	12/31/9999	Pay Add'l Hours
2036	01/01/1990	12/31/9999	Accrual - 26.75 days/yr
ZADJ	04/01/2008	04/01/2008	Pre SAP Absence Adj
ZCT1	01/01/1990	12/31/9999	Comp Time Adj OTComp
ZCT2	01/01/1990	12/31/9999	Comp Time Adj On Call Cmp
ZHTX	01/01/1990	12/31/9999	Transfer Hol to Hol Comp
ZWDJ	01/01/2008	01/01/2008	Pre SAP Work Time Adj
ZWDJ	04/01/2008	04/01/2008	Pre SAP Work Time Adj
ZZ07	01/01/1990	12/31/9999	Baylor Plan - Reg (End)
ZZ08	01/01/1990	12/31/9999	Incentive Pay - RN (End)
ZZ19	01/01/1990	12/31/9999	Incentive Pay - LPN (End)

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Notes

The Time Transfer Specifications infotype (IT2012) can be used to influence time management behavior and is typically applied to an employee by the Time Administrator. Infotype 2012 records are created for specific employees for specific periods of time. The HR Master Data Maintainer should understand the following subtypes for the time infotype 2012:

2004 - Set Actual Pay Behavior

Applicable for positive time/exception pay employees. This subtype record will cause the generation of leave without pay wage types to fill the difference between reported hours and planned hours. This causes the employee to be treated as a positive time/actual pay employee.


2005 - PERT Eligibility and Rate

Applicable for DOC employees eligible for PERT (Prison Emergency Response Team) premiums

2006 - Holiday Ineligibility

This subtype record will cause the suppression of Holiday Premium Pay during the validity period specified.

IT2012 – Time Transfer Specifications (cont.)



Infotype Edit Goto Extras System Help

Create Time Transfer Specifications (2012)

Personal work schedule Activity allocation

Personnel No 80000327 Name Kumar Retna
 EE group SPA Employees Personnel ar 4601
 WS rule D01N086N MTWTF-8,SaS-O
 Start 08/18/2008 To 08/18/2008

Time transfer specification
 Time transfer type 2004 Retirement Service (Yrs)
 Number of hours Hours

Trly	Start Date	End Date	Time transfer type text
2004	01/01/1990	12/31/9999	Set Actual Pay Behavior
2005	01/01/1990	12/31/9999	PERT Eligibility & Rate
2006	01/01/1990	12/31/9999	Holiday Ineligibility
2007	01/01/1990	12/31/9999	Baylor Plan - Reg (Beg)
2008	01/01/1990	12/31/9999	Incentive Pay - RN (Beg)
2009	01/01/1990	12/31/9999	Pay Immediate After 10
2010	01/01/1990	12/31/9999	Stop Longevity Payout
2019	01/01/1990	12/31/9999	Incentive Pay - LPN (Beg)
2020	01/01/1990	12/31/9999	Immediate Payout (OT)
2021	01/01/1990	12/31/9999	Process Adverse weather
2025	01/01/1990	12/31/9999	Commerec Monthly Long
2030	01/01/1990	12/31/9999	EPA Lump Sum Vac Acc
2031	01/01/1990	12/31/9999	Accrual - 26 days/yr
2032	01/01/1990	12/31/9999	Accrual - 24 days/yr
2033	01/01/1990	12/31/9999	% Longevity paid
2034	01/01/1990	12/31/9999	Pay Adot Hours
2036	01/01/1990	12/31/9999	Accrual - 26.75 days/yr
ZADJ	04/01/2008	04/01/2008	Pre SAP Absence Adj
ZCT1	01/01/1900	12/31/9999	Comp Time Adj OTComp
ZCT2	01/01/1900	12/31/9999	Comp Time Adj On Call Cmp
ZHTX	01/01/1900	12/31/9999	Transfer Hol to Hol Comp
ZWDJ	04/01/2008	01/01/2008	Pre SAP Work Time Adj
ZWDJ	04/01/2008	04/01/2008	Pre SAP Work Time Adj
ZZ07	01/01/1990	12/31/9999	Baylor Plan - Reg (End)
ZZ08	01/01/1990	12/31/9999	Incentive Pay - RN (End)
ZZ19	01/01/1990	12/31/9999	Incentive Pay - LPN (End)

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Notes

2007 - Baylor Plan – Reg (Beg)

ZZ07 - Baylor Plan – Reg (End)

Applicable RNs working under a regular Baylor Plan contract

2018 - Baylor Plan + Bonus (Beg)

ZZ18 - Baylor Plan + Bonus (End)

Applicable RNs working under a Baylor Contract with a bonus at the completion of the contract

2008 - Incentive Pay – RN (Beg)

ZZ08 - Incentive Pay – RN (End)

Applicable RNs working under an Incentive Pay contract

2019 - Incentive Pay – LPN (Beg)

ZZ19 - Incentive Pay – LPN (End)


Applicable LPNs working under an Incentive Pay contract

2009 - First 10 hrs Comp

Applicable for subject employees who have a position with a Overtime Eligibility (IT9005) record that does not indicate “pay immediately”. This subtype record will cause the additional hours worked beyond 50 in a week to be paid immediately. The first 10 hours of additional time worked will be compensated with Compensatory Time at the appropriate rate.

Knowledge Check

- Identify how information in time or scheduling infotypes can affect employee pay
- Describe how a work schedule assignment affects an employee's pay
- View time settings for a position
- Explain when to notify payroll regarding changes in settings



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Notes

New Terms and Concepts

- Quota
- Quota Type
- Cross Application Time Sheet (CATS)
- Attendance/Absence Type (A/A Type)
- Positive Time or Negative Time
- Time Evaluation



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Notes

Quota – A balance reflecting an employees entitlement for Leave.


Quota Type – 2 digit code in SAP that indicates the type of quota. e.g., sick (15), holiday comp time (22).

Cross Application Time Sheet (CATS) – Acronym in SAP for the time sheet used by Time Administrators to enter or correct time

Attendance/Absence Type (A/A Type) – A code that reflects the nature of an employee's absence or attendance. Absence codes are for time off – sick, vacation, bonus, etc. Attendance codes reflect time worked - regular work, hours, make up time, etc.

Positive Time or Negative Time – Describes the requirement to enter all time worked and leave taken (Positive time), or to record exceptions from their normal work schedule only (Negative time)

Time Evaluation – The Nightly Time Evaluation run processes time rules and readies approved time for use for Payroll processing.

Quota Types			
Quota Type	Quota Text		
10	Vacation Leave		
15	Sick Leave		
20	Overtime Comp Time		
22	Holiday Comp Time		
24	Travel Compensatory Time		
26	On Call Comp Time		
31	Advanced Vacation Leave		
32	Advanced Sick Leave		
40	Holiday Leave		
50	Bonus Leave		
61	Adv weather # hours owed		
65	Community Service Leave		
66	Community Service - Tutoring		
80	Received Shared Leave		
85	Military Leave (Training)		

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Notes

Specific descriptions follow on the next pages.

Holiday Leave is the holiday that is due in the next 60 days, for positive time employees. A holiday absence will reduce the amount in the Holiday Leave Quota. Negative Time employees will not see an increase in their Holiday Quota in advance of a holiday.

Holiday Comp is earned when an employee works on a holiday.



Notes

All absences recorded as **'9000 - Approved Leave'** will be subject to this **Leave Hierarchy**. The Leave Hierarchy reflects the order in which leave balances will be deducted when an entry for an Approved Absence is approved and transferred at night. At the point of entry, the quotas are checked in succession until enough quota is found to cover the recorded absence. The system will only return a message 'no quota available' if it has checked each bucket and not found a balance to cover the absence.

The quotas will be automatically deducted in this order.

- 1) Holiday Comp
- 2) OT Comp
- 3) On-Call Comp
- 4) Travel Time Comp
- 5) Vacation
- 6) Bonus
- 7) Advanced Leave

For more information about OSP Leave policies, please refer to the OSP website:

<http://www.osp.state.nc.us/manuals/manualindex.htm>




Notes

The **Sick Leave Hierarchy** represents the order in which the system will deduct quotas when an entry of 9200 is recorded. Like the Approved Leave Hierarchy, the quotas are checked at the point of entry, and the quotas are deducted when time is approved and transferred.

Positive vs. Negative Time

Employees entering time will be classified as either positive or negative time.

Employee Time Reporting Type	Description
Positive time/exception pay	Employees record all of their time worked and all of their exceptions such as leave taken each month.
Positive time/actual pay	Employees record all time worked and are paid based on actual time recorded. This applies to Temporary Employees.
Negative time	Employees only record variations from their normal schedule, such as leave taken. Only employees "not-subject to FLSA" can be negative time.



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Notes

It is important to recognize the distinction between actual and exception pay.

Actual pay – Employee only receives pay for time reported. If no time is reported then no pay is received. Temporaries and NCDOT employees are actual pay.


Exception pay – Employee receives full pay unless Leave Without Pay are reported.

Positive time reporting – Always applies to all employees subject to Fair Labor Standards Act (FLSA). Only exceptions have to be reported.

Negative time reporting – Can only apply to employees that are exempt from FLSA. Only exemptions have to be reported.

NOTE: Exempt employees can be set as Positive time reporting. This may be necessary to maintain a consistent agency-wide time reporting structure.

Leave Offsetting



THE RULE:
Leave is to cover the gap between hours worked and the minimum expected work hours.

- When Approved Leave is taken in the same reporting period where the employee has worked hours over their normally scheduled work hours, the amount of leave taken will be offset with the extra work hours. The leave that had been recorded will be restored to the employees quota balances for later use. Leave restoration will be *first taken, first restored*.

Example: A Positive Time employee with a normal 5 X 8 hour work schedule works 4 ten-hour days and takes 8 hours of leave on Friday. In this scenario the 8 hours of leave will be automatically restored to the employee's Approved Leave quota balance and the employee will be paid for 40 hours.

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Notes

Entries made for Leave in excess of the minimum required work hours for the overtime period will automatically be restored to the employee's leave quota.


For more information about the OSP Leave Offsetting policy please consult the Leave policies:
<http://www.osp.state.nc.us/manuals/manualindex.htm>

Leave Offsetting (continued)



**40 HOURS – MINIMUM
REQUIRED WORK HOURS**

Monday	Tuesday	Wednesday	Thursday	Friday
8 HOURS APPROVED LEAVE	10 HOURS WORKED	10 HOURS WORKED	10 HOURS WORKED	10 HOURS WORKED



*Approved Leave, Sick Leave
and Community Service Leave
will be offset when the
employee achieves his
expected work hours in the
same OT period in which leave
was recorded.*

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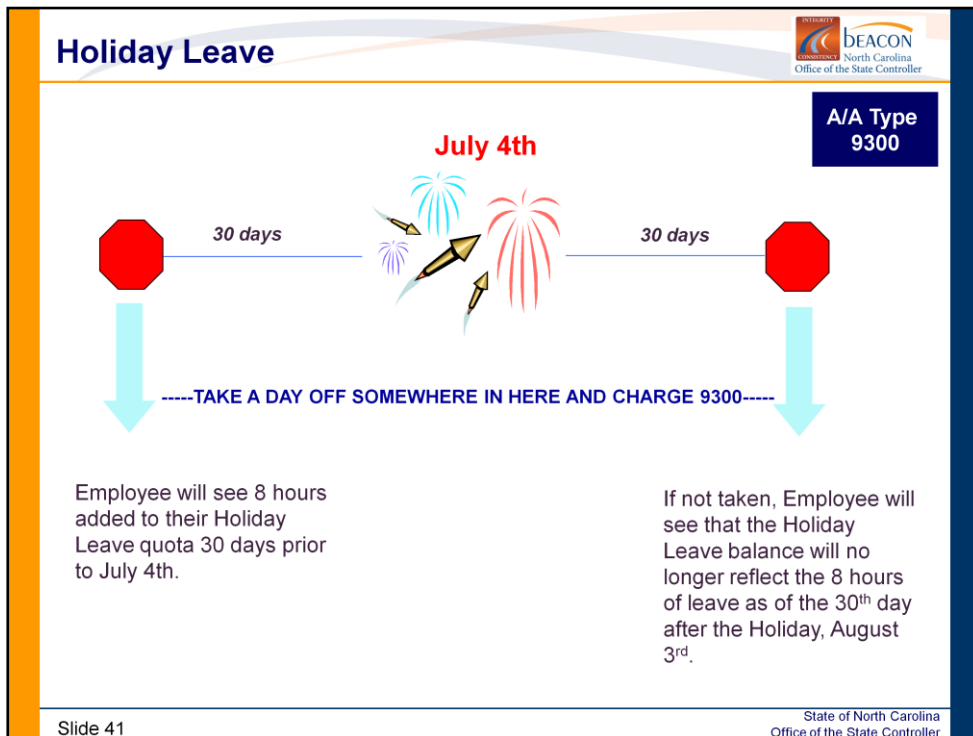
Notes

Quotas with established limits will be offset, except for holiday, civil and other management approved leave.

Entries made for Leave in excess of the minimum required work hours will automatically be restored to the employee's leave quota balances.

Leave restoration will be *first taken, first restored*. If a weekly employee takes Approved Leave on Monday, and then a day of Sick Leave on Tuesday, and then works an extra 8 hours on Wednesday, the Approved Leave from Monday will be the first to be restored.

NOTE: Leave Offsetting is done within an Overtime (OT) period. For normal, 40-hour, subject personnel, Leave Offsetting will be done within the 7-day OT period. For 28-day employees, the entire 28-day period is subject to offsetting.



Notes

Scenarios:

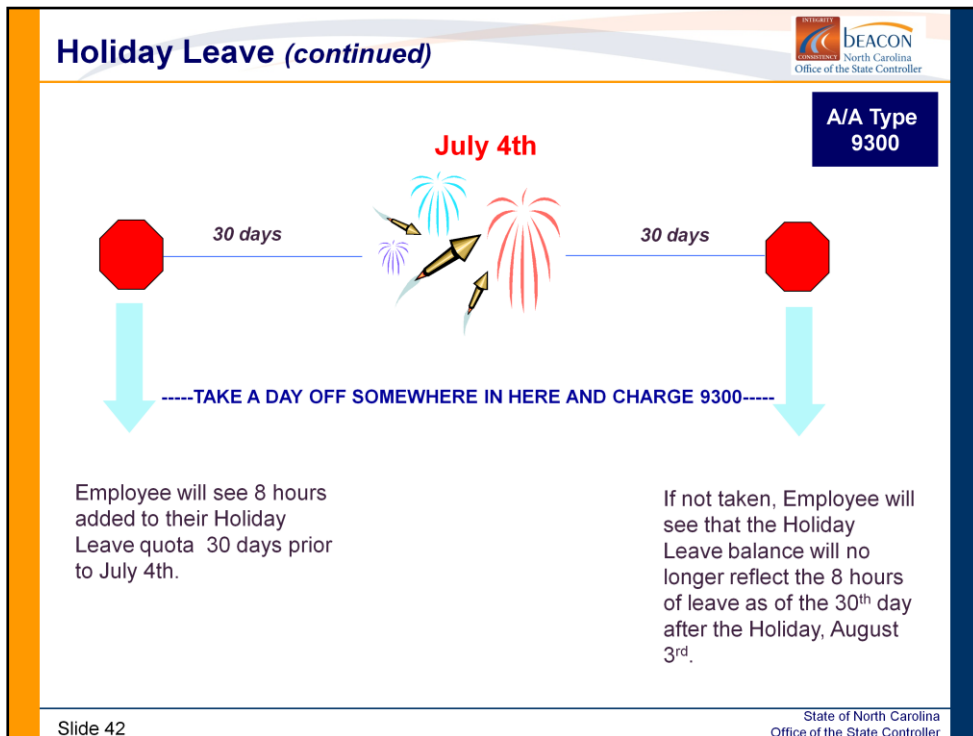
For Positive Time Employees

Will see holiday leave appear in their quotas 30 days prior to the holiday

May take the holiday from that date forward, not to exceed 30 days after the holiday

May observe the holiday on the day it naturally occurs. This 60-day holiday period is designed to provide flexibility for agencies with 24x7 operations.

- If the holiday falls on a regularly scheduled work day and the employee is off, the employee should record 9300, Holiday Leave.
- If the employee works on the Holiday, the employee will record work hours, will receive equal time off, up to 8 hours, and the relevant holiday premium pay. The Holiday Leave (9300) will be converted to Holiday Comp Time and placed in the appropriate Leave quota by the Time Administrator.
- If the holiday falls on a non-scheduled work day, the employee may record their holiday leave (9300) on another day, an absence they should arrange with their supervisor.

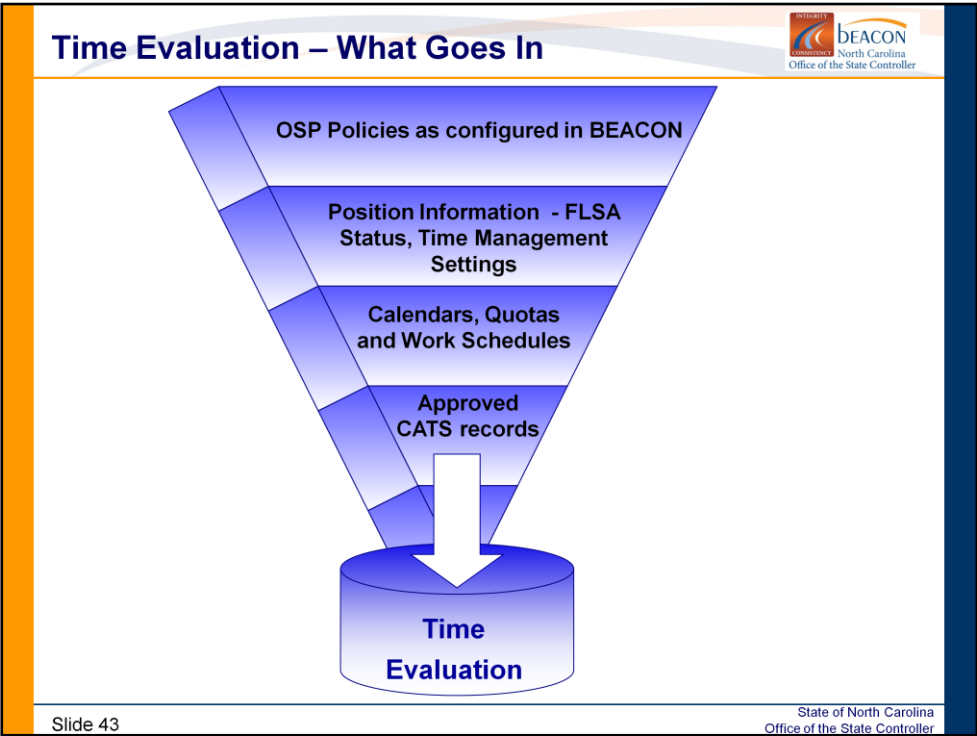


Notes

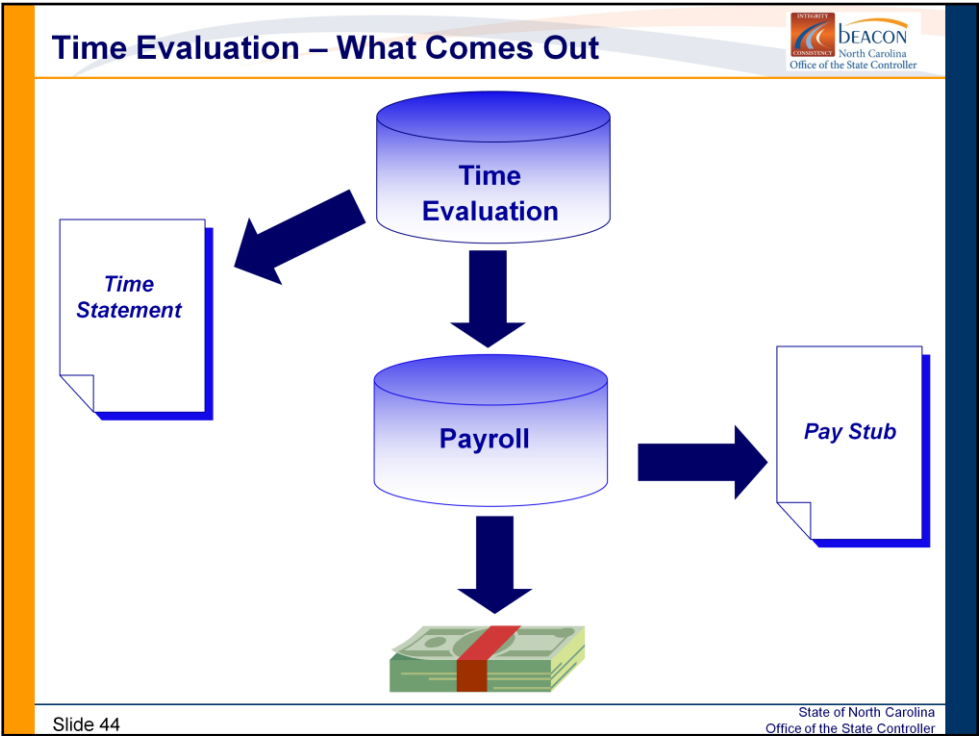
Scenarios continued:

Non-FLSA Subject employees who record exceptions only:

1. The only exception for these employees is if they **WORK** on the holiday. Otherwise, it will be assumed that they had the benefit of the holiday.
2. Some agencies allow the employees who normally work 4x10 to revert to a 5x8 schedule in the week of a holiday. This will not require a change to the employee's work schedule.




Notes



Notes

1:1 - Walkthrough




- **Log On To SAP**
 - You need to log on to the SAP training client so that you can complete course exercises.
- **Instructions**
 - Use the steps and date provided below to log on to SAP in the classroom.
 1. Access the SAP Training portal web page.
 2. Enter the User ID and password that is assigned to your classroom PC.
 3. Click the Log on button.
 4. Click Yes to confirm the security message displayed.
 5. Click on the SAP GUI tab.
 6. Click on the training client specified by your instructor.
 7. Stop when you have reached the SAP Easy Access screen.

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Notes

Knowledge Check



T	F	Question
		1. Vacation is used before Comp Time in the Leave Hierarchy
		2. SAP automatically deducts approved leave based on the new OSP leave hierarchy policy.
		3. Holiday Leave (A/A 9300) must be recorded by all employees.
		4. Positive Time employees get their holiday leave 30 days in advance.



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Notes

Lesson Review



In this lesson, you learned to:

- Explain how information in other BEACON modules may affect time, payroll, and quotas
- List leave quotas in BEACON.
- List key changes:
 - Leave Hierarchy
 - Leave Offsetting
 - Holiday Behavior
 - Time Evaluation

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Notes


Course Map

Lesson 1: Overview

Lesson 2: Quota Management

Lesson 3: FMLA

Lesson 4: Reporting and Troubleshooting



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Notes

Lesson Objectives

Upon completion of this lesson, you should be able to...


- View quotas.
- Modify quota balances.
- Describe Community Service Leave in BEACON.
- Convert quota from CSL to CSL-Tutoring.
- Describe Voluntary Shared Leave process at a high level.

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Notes

Quota Accruals



- **Who accrues?**
 - Employees with a employer/employee non-temporary relationship with the State
- **When do Employees Accrue?**
 - Positive time employees must record time worked or leave for 50% of their scheduled work days in the pay period to accrue in that period. The accrual date depends on the number of work days, as derived from the employee's work schedule.
- **What counts for accrual?**
 - Any approved entry that puts the employee in a pay status for that day will count towards the 50% achievement.
- **What do they accrue?**
 - Hours and minutes, in decimals
- **What is prorated?**
 - Annual Leave and Sick Leave are prorated for part-time employees. Community Service leave is prorated for new hires starting after mid-January.

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Notes

The accrual date depends on the number of work days, as derived from the employee's work schedule.


- For example:
 - An employee works 5 days a week.
 - There are 21 work days for this employee, on this work schedule, in the current month.
 - The employee would accrue his leave when time is entered and approved through the 11th workday of the month *.

Employees with intermittent LWOP could conceivably accrue later in the month.

Any approved entry that puts the employee in a pay status for that day will count towards the 50% achievement.

NOTE: Only time entries that place the employee in a pay status are counted toward achievement of 50%. Any entry for Leave without pay (LWOP – A/A type 9400) will delay the accrual of leave until the employee meets 50% of the period in a pay status.

Accruals – When and How



THE RULE:

An employee will accrue their leave when they have achieved 50% of their payroll period.

- Employees who are Positive Time must demonstrate that achievement by recording time.
- Employees who record only their exceptions (Negative Time) will receive their accruals based on their planned Working Time.

NOTE: BEACON recommends weekly time entry to ensure timely and accurate accruals. Agencies adopting monthly entry deadlines for their Positive Time Recording population will see a delay in the monthly accruals.

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Notes

Quotas – Recording Leave



- Employees accrue leave when the time has been earned based on approved timesheet entries. Leave may not be taken before it is earned. Time must be entered, approved and evaluated before the accrual will be done.
- Leave earned on the 15th day may not be applied to an absence on the 10th.
- Quotas cannot be negative. Employees and Time Administrators cannot record more leave than the employee has available on that date.
- Leave Administrators have the responsibility to research Quota problems and make appropriate adjustments.


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Notes

NOTE: It is within the agency's discretion to permit a Leave Administrator to adjust the validity date or deduction date. This would be unusual, but can be done. It is not standard practice.

Advanced Leave



- Agencies may elect to Advance leave in accordance with OSP Policy. Typically this is rare and for a specific purpose, not vague or casual.
- A Leave Administrator, with management approval, would create an Advanced Leave Quota for the hours awarded.
- The Advanced Leave Quota will be consumed when the employee records an absence that deducts from that Quota.
- The system will generate a Liability for the employee based on the hours taken. It will recover future accruals towards that liability until it is satisfied.
- The Advanced Leave Request form is available online.

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Advanced Leave is subject to the limits in the OSP Policy manual.

The recovery of liabilities is reflected on the Time Statement.

Notes

Advanced Leave - Recovery of Liabilities



Advanced Leave

- As leave is accrued, it will be used to satisfy an outstanding Advance Leave liability of the same type (i.e., vacation accruals will be used to pay back vacation advances).
- If an employee has an outstanding Advanced Leave liability and works hours in excess of their required minimum hours, those excess hours worked will be used to pay back the liability until it has been satisfied.

The recovery of liabilities is reflected on the Time Statement.

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Notes

Adverse Weather

- Absence due to adverse weather is entered using the Adverse Weather A/A type – 9545.
- During Time Evaluation this A/A type will cause the creation of an adverse weather liability.
- During subsequent Time Evaluation the system will check for the Adverse Weather Make-up A/A type – 9512 for regular hours worked, as well as regular hours worked in excess of the required minimum hours.
- The adverse weather liability will be reduced accordingly when either is present.

Quota Overview Snapshot

Selection tab lets user change date range

Absence quotas tab shows quota balances

Accruals tab shows quota generations & adjustments

78197877
Wednesday May
001 Agriculture Conservation Cost Center 189999999 AGRICULT
A1 FT N-FLSAOT Per WS rule D01N88 MTWHF-8;

Not in use

Selection dates Absence quotas Accrual information Attendance quotas

Totals row	AbQuotaTyp	Quota text	Unit	Entitl.	Rem.	Requested	Compens.	D
Σ	10	Vacation Leave	Hours	80.00000	80.00000	0.00000	0.00000	
Σ	15	Sick Leave	Hours	80.00000	40.00000	40.00000	0.00000	
Σ	40	Holiday Leave	Hours	24.00000	24.00000	0.00000	0.00000	
Σ	65	Community Service	Hours	24.00000	24.00000	0.00000	0.00000	

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Notes

The Quota Overview (PT50) transaction has several key tabs:

- **Selection dates** – tab allows user to choose the period of time they wish to view
- **Absence quotas** – tab shows quota types and their balances (shown above)
- **Accrual information** – tabs shows accrual information
- **Attendance quota tab** – not in use

On the Absence quotas tab there are several columns showing key values:


- **Entitlement** – what is added to the quota balance through accruals, offsets, or adjustments during the display period
- **Remaining** – hours left for use by employee
- **Requested** – hours deducted

On the Accrual Information tab:

- **Generated** – calculated by the system and ready to be moved into employee's quotas during next Time Evaluation
- **Transferred** – moved into employee's quota and available for use

2:1 - Instructor Demonstration

- **Quota Overview – PT50**
 - You wish to view an employee's quota balances
- **Required data:**
 - Personnel number – See exercise guide




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Notes

2:2 - Walkthrough

- **Quota Overview – PT50**
 - You wish to check an employee's accrual rate for Vacation Leave
- **Required data:**
 - Personnel number – See exercise guide



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Work Instruction: Quota Overview – PT50

Notes

Quota Adjustments

- Quota adjustments can be used to:
 - Correct quota errors
 - Advance leave
 - Convert Community Service Leave to community service leave tutoring
 - Administer Voluntary Shared Leave*
- Quota adjustments are done by selecting the Quota subtype and then entering the number of hours.
- Transaction – Maintain Time Data - PA61
 - Infotype 2013
 - » Subtype 10 – Vacation
 - » Subtype 15 – Sick Leave
 - » Subtype 31 – Advanced Vacation
 - » Subtype 32 – Advanced Sick

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Notes

The list above is a partial list of Quotas. A complete list may be viewed in SAP.

* The *TM340 - Voluntary Shared Leave* Web-based training course is available. Contact your Agency Training Agent to enroll you in this course.

Quota Corrections Snapshot

Absence quota type Vacation Leave

Change accrual entitlement

Quota number Hours

☒ Increase generated entitlement
☐ Reduce generated entitlement
☐ Replace generated entitlement

Change transfer time

Transfer

Choose Carefully: Increase or Reduce

Always choose transfer immediately

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Notes


Leave Administrators have the following options to choose that are *allowed* by the system:

- Increase
- Reduce
- Replace (do not use!)

The Leave Admin must also choose a transfer option – **ALWAYS choose “Only transfer quota correction immediately.”** Transfer Immediately means that it will transfer with the next run of Time Evaluation.

Quota balance will reflect the change once Time Evaluation has been run at night.

Holiday Quota Corrections



- If a Positive Time employee fails to record 9300-Holiday Leave within the 60-day period AND fails to record work time on the Holiday, the Time Administrator will see a Time Evaluation error message:
“Holiday Not Taken”
- The Time Administrator should confirm that the employee has not had the benefit of the holiday.
- If the employee has not had the benefit of the holiday, the Time Administrator will request that the Leave Administrator increase the Employee’s Holiday Comp Quota for the hours not taken.

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Notes

Leave Administrators will not typically be looking at Time Evaluation Error Messages but they do have access to a transaction to do so. Leave Administrators need to access the Time Evaluation Messages Display (PT_ERL00) transaction. If a Time Administrator makes a correction in the timesheet to show the holiday as taken, it will result in a retro calculation that will eliminate the message.

The only time action that will be required by the Leave Administrator is if the employee did not have the benefit of the Holiday. The Leave Administrator must reduce the Holiday quota by 8 hours for a holiday not taken and increase the Holiday Comp Quota by the same 8 hours.

2:3 - Instructor Demonstration

- **Quota Adjustment – Vacation Leave – PA61**
 - You need to increase an employee's vacation quota by 10 hours to correct an error.
- **Required data:**
 - Personnel number – See exercise guide
 - Infotype – 2013
 - Subtype 10




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Notes

2:4 - Walkthrough

- **Quota Adjustment – Advance Leave – PA61**
 - You need to create an advance leave quota adjustment for an employee based on an approved request for 40 hours of vacation.
- **Required data:**
 - Personnel number – See exercise guide
 - Infotype – 2013
 - Subtype – 31



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Work Instruction: Advanced Leave – PA61

NOTE: The creation of the absence quota doesn't create a liability. The absences recorded for the employee that use the Advanced Leave will create a liability from the Employee to the State.

Notes

2:5 - Exercise

- **Quota Adjustment – PA61**
 - You need to adjust an employee's sick leave balance to correct an error that occurred prior to Go Live
- **Required data:**
 - **Personnel number** – See exercise guide
 - Infotype – 2013
 - Subtype – 15



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NOTE: Normally, time balances should be adjusted through corrections to CATS entries if possible.

Work Instruction: Quota Adjustment PA61

Notes

CSL to CSL Tutoring Option

- Full time employees may opt to convert their 24 hours of community service leave (CSL) to 36 hours of community service tutoring.
- Tutoring leave should be taken in 1 hour increments
- Employees that elect tutoring must use A/A Type 9565

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Notes


Employees accrue 24 hours of Community Service Leave (CSL) annually. Full time employees may opt to convert their 24 hours of community service leave (CSL) to 36 hours of community service tutoring. This conversion is performed by creating a quota correction to reduce quota 65 to zero hours and another to increase quota 66 to 36 hours.

CSL must be used between January 1st and December 31st within the calendar year.

CSL should be used in one-hour increments.

2:6 - Walkthrough

- **Convert CSL to CSL Tutoring – Quota Adjustment – PA61**
 - You need to convert an employee's 24 hours of community service leave to 36 hours of community service leave – tutoring.
- **Required data:**
 - Personnel number – See exercise guide
 - Infotype – 2013
 - Subtype – CSL – 65 and CSL – Tutoring - 66



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Work instruction: Quota Adjustments– PA61

Notes




Notes

As with the other topics in this lesson, the Voluntary Shared Leave process is administered with Quota Adjustments.

* The *TM340 - Voluntary Shared Leave* Web-based training course is available. Contact your Agency Training Agent to enroll you in this course.

Voluntary Shared Leave Process



1. A Voluntary Shared Leave Event must be established:
 - Date of the event should reflect the start date of the employee's confinement or disability.
 - No system check for eligibility
2. A Donation must be processed.
3. The Recipient must be credited.

BEST Shared Services will manage donations when the Donor and Recipient are in different BEACON agencies.

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Notes


A leave administrator will process leave donations within their agency. Donations are usually Vacation Leave. If the Recipient is related to the Donor, the Donor may elect to donate Sick Leave.

For clarification on who may donate to whom and the limits on the amount of leave that may be donated, refer to the OSP Policy Manual online at the following URL:

<http://www.osp.state.nc.us/manuals/dropdownmenu.html>

Detailed work instructions are available on the BEACON Online Help site for the VSL process.

Ending of VSL Events



- Unused leave, in excess of 40 hours, must be returned to ACTIVE employees, on a pro-rated basis at the end of the Shared Leave event.
- Leave administrators may manage the return of leave to Donors if all Donors are in the Recipient's agency.
- If leave is to be restored to people outside the agency, then the Leave Administrator must contact BEST Shared Services.
- The VSL Event must be ended by changing the To date filed in the VSL event.


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See the State's VSL policy.

Notes

Knowledge Check



T	F	Question
		1. Employees accrue on the 1st of the month.
		2. Advanced Leave requires management approval.
		3. Recovery of liabilities is automatic.
		4. Subtype 10 is Sick Leave.
		5. Quota Adjustments are done through PA61.
		6. Employees must formally elect the tutoring option.



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Notes

Lesson Review

In this lesson, you learned to:

- View quotas.
- Manage quota adjustments.
- Describe Community Service Leave in BEACON.
- Convert quota from CSL to CSL-Tutoring.
- Describe Voluntary Shared Leave process at a high level.



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Notes

Course Map

Lesson 1: Overview

Lesson 2: Quota Management

Lesson 3: FMLA

Lesson 4: Reporting and Troubleshooting

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FMLA is the Family Medical Leave Act.

Notes

Lesson Objectives

Upon completion of this lesson, you should be able to:


- Create FMLA Events.
- Apply absences during a FMLA Event.
- Describe the ending of a FMLA Event.

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Notes

New Terms and Concepts



FMLA event

- A qualified event under the Federal Law that guarantees an employee’s job will be protected during an absence of up to 12 weeks.

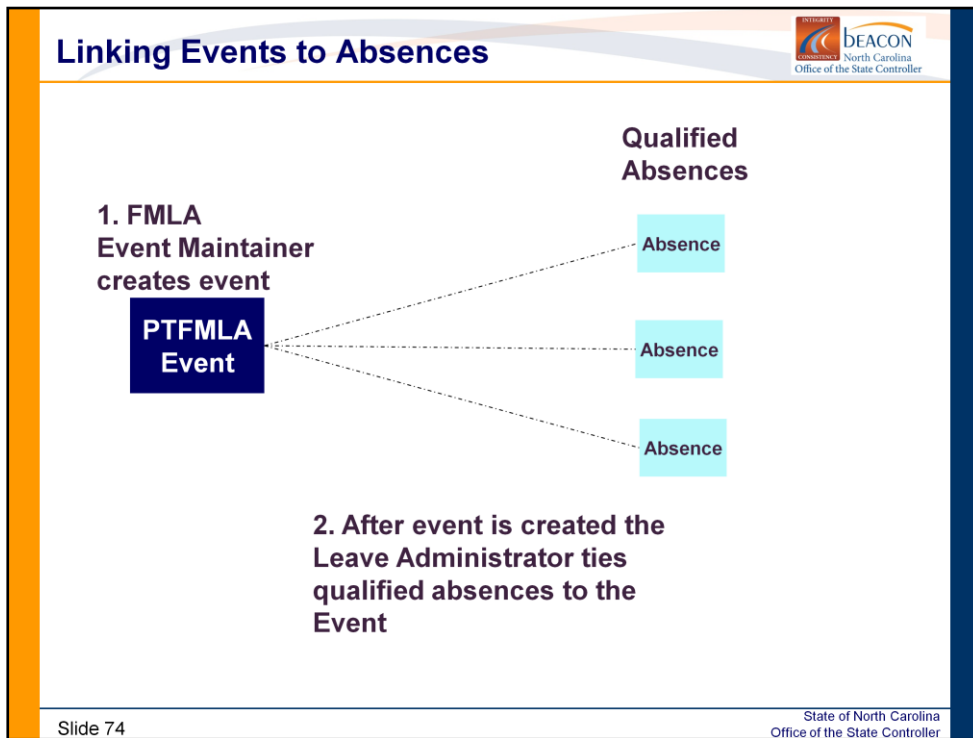
FMLA absences

- An absence that falls during an employee’s FMLA event period that is attributable to that event.

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Notes



Notes

There are two FMLA profiles:

- FMLA Maintainer
- FMLA Administrator

There is a security role – FMLA Event Maintainer – that may create FMLA Events.

All Leave Administrators may apply absences, but not all may create events.

Approved Leave, Sick Leave and LWOP absences may be applied to an FMLA event.

Paid or unpaid absences may be applied. Pay status is irrelevant.

Donated Leave under Voluntary Shared Leave (VSL) does not affect FMLA. Absences are recorded as Sick Leave and applied to the FMLA event, same as other absences.

3:1 - Instructor Demonstration

- **Create FMLA Event – PTFMLA**
 - You need to create a FMLA event in SAP based on an approved FMLA request by an employee.
- **Simulation:**
 1. Access BEACON help @ <http://help.mybeacon.nc.gov/beaconhelp>
 2. Select Human Resources.
 3. Select Time.
 4. Select the Simulation  button next to Processing FMLA Event.



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Notes

Use the PTFMLA Simulation to demonstrate the creation of a PTFMLA event.

Simulations are available for key transactions. Simulations may be used as a practice tool or as a refresher as needed.

3:2 - Walkthrough

- **Apply Absences To FMLA Event – PTFMLA**
 - You need to apply absences for an employee on FMLA to their open FMLA Event.
- **Required data:**
 - **Personnel number** – Refer to instructor data sheet




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Work instruction: Processing PTFMLA Event - PTFMLA


Notes

FMLA – Ending the Event



The FMLA event will end when either:

1. The 12 month rolling period has expired
- or
2. The **FMLA Event Maintainer** changes the end date.



FROM → TO


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Changing the end date held in the PTFMLA To field will end (delimit) the event.

Notes

Knowledge Check



T	F	Question
<input checked="" type="checkbox"/>	<input type="checkbox"/>	1. All absences during an FMLA event are FMLA relevant
<input type="checkbox"/>	<input type="checkbox"/>	2. All Leave Admins may create FMLA events.
<input checked="" type="checkbox"/>	<input type="checkbox"/>	3. An employee may be out greater than 12 weeks
<input type="checkbox"/>	<input type="checkbox"/>	4. Voluntary Shared Leave has no effect on FMLA.



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Notes

Lesson Review

In this lesson, you learned to:

- Create FMLA Events.
- Apply absences during a FMLA Event.
- Describe the ending of a FMLA Event.

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Notes

Course Map

Lesson 1: Overview

Lesson 2: Quota Management

Lesson 3: FMLA

Lesson 4: Reporting and Troubleshooting

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Notes

Lesson Objectives

Upon completion of this lesson, you should be able to:


- Review Time and Leave entries with transaction CATS_DA.
- Review Leave results with Time Statements.
- Troubleshoot quota concerns.

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Notes

About Troubleshooting



PRACTICE
This lesson is designed to introduce troubleshooting. After class be sure to practice and explore.

BE PATIENT
Troubleshooting is a skill that is honed over time – don't be alarmed if you don't feel like an expert at the end of class.

IT GETS EASIER
As you become more familiar with the BEACON system, data, processes, and transactions your comfort with troubleshooting will increase.

DON'T WORRY
The transactions discussed in this topic are displays and reports. They don't update or change data so running them will not "hurt" anything.

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Notes

Display Working Time – Quota Usage

Display Working Times, transaction CATS_DA, allows for the review of an employee's time records for a specified period of time.

- It reflects time as it was entered. Changes to entries are reflected as additional lines on the same date.
- It displays A/A codes, amounts, premium codes, and audit details.
- It can be subtotaled by A/A types or searched by specific A/A types.

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Notes


CATS_DA will not display changes to the data that resulted from Time Evaluation.

Time Evaluation will offset leave taken in a week where the employee has exceeded their minimum expected work hours.

Leave that has been offset will show on the employee's Time Statement.

4:1 - Walkthrough

- **Display Working Times - CATS_DA**
 - You wish to view an employee's working times in SAP.
- **Required data:**
 - Personnel number – See exercise guide



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Work instruction: Display Working Times – CATS_DA

Items to demonstrate:

1. Display data
2. Subtotal Data
3. Change columns to display
4. Filter for a single A/A type

Notes

Time Statements





Beacon Time Statement

01/01/2007 to 01/31/2007

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Personal / Organizational Data

Personnel Number	95301008	Cost Center	1800000000
Name	Anita INT22-1801-NC01-0-GB-1	Work Schedule	001N08GN
Position	YOUTH TRANSPORTATION DRIV	Emp Group	A- SPA Employees
Org Unit	Juv Justice Counselors	Emp Sub Group	B1- FT S-F LSAOT Perm
Personnel Area	1801-Juvenile Justice Delinquency	Months Of Service	
Sub Area	NC01- 7day Norm		

Reported Hours

Time Account	Hrs	Time Account	Hrs
Work Hours	0.00	Additional Hours	0.00
Paid Leave Taken	0.00	Leave Without Pay	0.00

Calculated Hours

Time Account	Hrs	Time Account	Hrs
Regular Time	0.00	Evening Premium	0.00
Straight Overtime	0.00	Night Premium	0.00
Time & Half Overtime	0.00	Weekend premium	0.00
Holiday Premium	0.00		

Absence Entitlements

Description	Beg. Balance	Accrued	Used	Paid	Expired	Offset	End Balance
-------------	--------------	---------	------	------	---------	--------	-------------

Leave Liabilities

Description	Beg. Liability	Increased	Recovered	Ending Liability
-------------	----------------	-----------	-----------	------------------

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Notes

The Time Statement is a summary of the employee's time in a given pay period, after Time Evaluation.

The Time Statement shows:


- Overtime
- Premium Pay
- Leave Accrued
- Leave Taken
- Leave Offset

The Time Statement is not a pay slip. It is a summary of time data for an employee as determined in Time Evaluation. It does not reflect compensation.

Payroll uses the data from Time Evaluation to generate paychecks.

Time Statements *(continued)*

- Summary of all time data entered for an employee during a specific period
- ESS time users will be able to view time statements online.
- Time Administrator can print Time Statements for employees as needed.



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Notes

Time statements may be printed individually or via a batch process by the Time Administrator.


Use Time Statement form ZTS0.

Time Statement can show:

- Leave that was Accrued
- Leave that was Offset
- Liabilities that were recovered
- Donations that were applied
- 9901s (Aging comp time balances)
- Position Settings

The Time Statement is the first place to go when an employee identifies a potential error.

Troubleshooting Quota Concerns



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Transaction Code	Description	Usage
CATS_DA	Display Working Times	To review employee's recorded working times and leave usage (minus offsets)
ZNCTIME	Time Statement	To review final period leave usage, leave liabilities, and leave offsets
PA51	Display Time Data	Used to review service dates and other key time infotypes
PT50	Quota Overview	Check balances and accrual details

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The SAP transactions listed in the chart above are useful for troubleshooting quota concerns.

Notes

4:2 - Instructor Demonstration



- **Troubleshooting Improper Leave Deduction – CATS_DA & ZNCTIME**
- **Scenario**
 - Employee says his leave was improperly deducted.
- **Troubleshooting steps:**
 1. CATS_DA → Display the relevant period for the employee.
 2. ZNCTIME → Open a new session to display the Time Statement for the relevant period.
- **Things to look for:**
 - Look for leave recorded in CATS and corresponding Leave activity on the time statement.
- **Most likely causes:**
 - Keying error on initial entry or leave offset
- **FIX:**
 - Correct initial entry errors, re-run time evaluation (or wait 1 day)

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Work instructions: Display Working Times – CATS_DA and Time Statement – ZNCTIME

Notes

4:3 - Exercise

- **Troubleshooting Improper Accrual – PT50 & PA61**
- **Scenario**
 - Employee says his accrual was incorrect. Says he has passed his 10 yr anniversary date and should be accruing at the 10 yr rate.
- **Troubleshooting steps:**
 1. PT50 → Quota Overview to view accrual details on the Accruals tab
 2. PA61 → Open a new session to display Time Data. Review creditable service - Infotype 552 and Infotype 41



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Work instructions: Quota Overview – PT50 and Display Time Data – PA61


Errors in Service Dates should be referred to the HR Master Data Maintainer for research or correction.

Notes

Knowledge Check



T	F	Question
<input checked="" type="checkbox"/>	<input type="checkbox"/>	1. Employees will be paid for everything recorded in CATS.
<input type="checkbox"/>	<input type="checkbox"/>	2. CATS_DA is capable of showing a list of employees.
<input checked="" type="checkbox"/>	<input type="checkbox"/>	3. Time Statements are always available.
<input type="checkbox"/>	<input type="checkbox"/>	4. Leave that has been offset will show in CATS_DA.
<input checked="" type="checkbox"/>	<input type="checkbox"/>	5. Time Statements display compensation.



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Notes

Lesson Review

In this lesson, you learned to:

- Review Time and Leave entries with transaction CATS_DA.
- Review Leave results with Time Statements.
- Troubleshoot quota concerns.



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Notes

Course Review

In this course, you learned to:

- Describe the Quotas available to employees.
- Describe and execute the process for quota corrections.
- Describe and execute the maintenance of FMLA-relevant absences.
- Perform basic quota reporting and troubleshooting.



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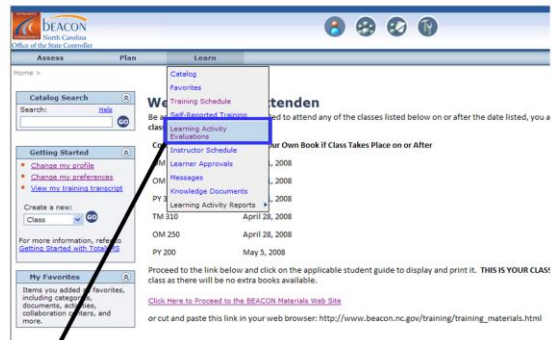
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Notes

Level 1 – Course Evaluation

Level 1 evaluations are used by the BEACON Training Team to ensure students are experiencing their instruction in an environment and method that is conducive to learning.



- Self-Reported Training
- Learning Activity Evaluations
- Instructor Schedule
- Learner Approvals

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Notes

Level 1 Evaluations

The Level 1 evaluation classes is accessed as shown above (**Learner Home Page > Learn > Learning Activity Evaluations**).

Ask your instructor if you have any difficulty accessing the course evaluation.

Next Steps

Monitor BEACON communication

- BEST Shared Services web site (especially the Updates tab)
 - URL: <http://www.ncosc.net/BEST/>
- BEACON Training website: **What's New link**
 - URL: http://www.beacon.nc.gov/training/whats_new.html


Review conceptual materials

Access BEACON Help

- Access from an SAP transaction
 - URL: <http://help.mybeacon.nc.gov/beaconhelp>

Practice what you've learned

- URL: <https://mybeacon.nc.gov>
- Client 899
- Use your current NCID user name and password



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Notes

Continue to monitor updates on the BEACON University website for information regarding any future training that you are scheduled to attend.


Keep your training materials close by as a ready reference.

Want to practice what you have learned from your desk?


- Follow the link provided above to access the training client on the BEACON website. The training client is number 899. Your current NCID user name and password are used to access the practice environment.

Need transactional assistance after go live?

- Remember to access BEACON help when you need assistance in completing transactions. As stated above, the work instructions can be accessed either on line or by clicking on BEACON help from within an SAP transaction.



CONGRATULATIONS



You have completed the course

Please complete your course evaluation!

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Notes